

**REPORT TO: WEALTHIER AND FAIRER GROUP – 21 MAY 2009**

**SUBJECT: SOA PERFORMANCE REPORT (2008/09)**

**BY: CORPORATE POLICY UNIT MANAGER**

**1. REASON FOR REPORT**

1.1 The Wealthier and Fairer Group is invited to consider an analysis of performance in addressing the national and local outcomes over the first year of the SOA (2008/09).

**2. RECOMMENDATION**

2.1 It is recommended that the Wealthier and Fairer Group:

- (i) Approves the analysis of performance against the actions addressing the national and local outcomes over the first year of the SOA;
- (ii) Notes the current performance against the indicators and that this position will be updated as information becomes available; and
- (iii) Notes the recommendations for improvement in the monitoring of the new SOA (2009/10) based on lessons learned from the conduct of the process during the first year.

**3. BACKGROUND**

3.1 This information has now been updated to the end of Quarter 4 of 2008/09. The Quarter 4 information completes the cycle of performance reporting on the SOA (2008/09). The monitoring reports are an important aspect to demonstrate to Government that the community planning partnership's has contributed to the delivery against the local and national outcomes.

- 3.2 A detailed analysis of performance against each of the actions for which the Wealthier and Fairer Group is responsible, has been carried out and is set out in **Appendix 1** under each of the relevant local and national outcomes.
- 3.3 The following table provides a summary of performance in statistical terms under each of the national outcomes for which the Wealthier and Fairer Group is responsible.

National Outcome	Actions Contributed	Actions Partially Contributed	Actions Not Contributed	Total
1	5	8	5	18
2	6	1	1	8
13	3	-	-	3
<b>Total</b>	<b>14 (48%)</b>	<b>9 (31%)</b>	<b>6 (21%)</b>	<b>29</b>

The second and third columns represent the actions, which have been deemed to have contributed or partially contributed to the identified SOA local outcomes. It will be noted that 48% of the actions are deemed to have made a significant contribution towards meeting the outcomes with 31% partially contributing towards them. Many of the actions partially contributing relate to longer-term projects where the necessary groundwork in respect of processes and infrastructure has been, or is being, put in place in preparation for future achievements. These actions will require to be closely monitored within the new SOA if they are still a contributory action.

The fourth column identifies the number of actions, which have been deemed not to have contributed to the outcomes. Of the 21% of actions in this category many have been delayed and are anticipated to be completed by the end of 2009/10.

- 3.4 The following table provides a summary of performance in statistical terms under each of the national outcomes for which the Wealthier and Fairer Group is responsible. The detailed report on the indicators in attached as **Appendix 2**.

National Outcome	Improved	Worsened	No Change	Cannot be Calculated	Total
1	-	-	-	10	10
2	1	1	1	10	13
13	-	-	-	1	1
<b>Total</b>	<b>1 (4%)</b>	<b>1 (4%)</b>	<b>1 (4%)</b>	<b>21 (88%)</b>	<b>24</b>

Of the indicators which can be calculated at this time, it shows that one indicator improved with one indicator worsening. However it should be appreciated that most of these indicators show a long term trend and therefore would not expect a dramatic improvement to be seen after only one year of action. Indicators which cannot be calculated have

included a date when the information is likely to be available. In most cases it should be available by the September deadline for publishing the performance report.

### 3.5 Summary Analysis of Progress

#### 3.5.1 **National Outcome 1 – We live in a Scotland that is the most attractive place for doing business in Europe**

Some progress has been made to support businesses. Our focus was on improving the transport infrastructure, and the environment for new and expanding businesses. Both of these aims are long term initiatives and their success relies heavily on the external market and national commitments.

The contribution made by actions against this outcome includes:

- Increase numbers of art students at Moray College and national recognition for some of the work created
- Support to 45 companies with a potential projected GVA of £47m
- 2 additional business units in Forres

A lot of progress has been made against the large scale projects which have set out the framework for future delivery. Some of the actions which have partially contributed to the outcome but will be continued into the SOA 2009-10 are:

- Tourist Strategy is complete which impacts on the delivery of heritage, Moray the Brand and marketing actions
- Master Plans/Schemes for Elgin Re-Development, Moray Towns Partnership, Elgin Bye-pass and Moray Lifescience Centre are underway
- Work on Reiket bridge which is important to the movement in and around Elgin has started

Of the two actions not contributing this year to the outcome, work will continue to progress these areas through:

- Business Gateway which has now opened
- Work on the Chanory land for businesses

#### 3.5.2 **National Outcome 2 – We realise our full economic potential with more and better employment opportunities for our people**

Overall progress has been made to improve employment opportunities. Our focus was on employment for young people and ensuring Moray's share of HIE funds.

The contribution made by actions against this outcome includes:

- 11 apprentices have been employed by the council in 2008-9 and based on the success of this initiative another 11 planned for 2009-10
- 5 social enterprise grow initiatives will result in £125,000 GVA

- 4 young people supported into the transition pilot programme

An action which has partially contributed to the outcome but will be continued into the SOA 2009-10 is promoting Moray and one action not contributing on marketing is linked to the Tourism Strategy.

### 3.5.3 **National Outcome 13 – We take pride in a strong, fair and inclusive national identity**

Overall progress has been made to ensure an inclusive society. Our focus was on our local communities and heritage.

All actions have contributed against this outcome which has mainly focused on the developments of ancestral tourism within Moray.

### 3.6 Public Performance Report

The performance information provided in **Appendix 1** will be used to inform the first Public Performance Report on the SOA (2008/09), which is due to be submitted to the Scottish Government in September 2009. The SOA Guidance published in September 2008 outlined that the reporting process will have a dual purpose – firstly an outward focus reporting to communities and the public on the delivery of outcomes in the local area and secondly feedback to the Scottish Government on the Council or Partnership's contribution towards the delivery of outcomes, which support the National Performance Framework. It is planned to complete the draft Public Performance Report for submission to the Community Planning Board at its Special Meeting on 10 June 2009 based on this information.

### 3.7 Improving the Future Monitoring Process

As the SOA (2008/09) was the first to be produced, the process of gathering the performance information during the year has presented many challenges, particularly given the considerable number of actions and performance indicators to be monitored. The reporting framework has been revised so that:

- Quarterly monitoring against the actions will continue to be presented to the strategic theme group against their outcomes and a comprehensive report to the Community Planning Board
- Annual reports against the performance indicators will be submitted to the strategic theme group against their outcomes and a comprehensive report to the Community Planning Board

On the basis of this experience, the following refinements are proposed to improve the efficiency and effectiveness of the monitoring process for the new SOA (2009/10):

- (i) Each strategic group has been allocated local outcomes under the 10 priorities within the SOA 2009-10. This will improve accountability for the outcomes to a specific group eliminating

- some of the confusion over which group was leading a particular outcome.
- (ii) Each strategic group will agree no more than 3 key actions for each of their local outcomes. This will enable the groups to focus on a limited number of actions which should enable closer monitoring and focused delivery against the actions.
  - (iii) For each of the key actions, a lead officer will be identified to enable the monitoring against the action to be easier. In addition it enables the groups to enhance their membership according to the actions with the appropriate officers to present their actions.
  - (iv) Lead officers will be required to set quarterly milestones which will form the basis of the quarterly monitoring reports. This ensures that progress against each can be clearly assessed and reported.
  - (v) Any resource implications which are additional to the current provision need to be reported to the Community Planning Board for either referral onto the lead partner to consider or to consider joint funding arrangements.

#### 4. SUMMARY OF IMPLICATIONS

- (a) **Community Plan / Theme Plans / Partner Plans**  
The reports sets out a detailed analysis of performance delivered during the year against the actions identified under the National Outcomes in the first SOA (2008/09).
- (b) **Policy and Legal**  
There is a requirement on all Community Planning Partnerships to monitor performance and report annually to the Scottish Government on delivering against the national outcomes in the SOA.
- (c) **Resources (Financial, Staffing and Risks)**  
Over the past year considerable time has been taken up with gathering the monitoring information. This has been due to a number of factors such as not defining the action in enough detail to enable proper reporting; descriptions of the progress which does not relate to the action or outcome or lack of reporting on the initial request. The improvements for monitoring the next SOA should alleviate some of this work.  
  
Resources for reporting against the SOA 2008-9 will be met by the Council. Resources for delivering against the actions identified within the key actions will be considered by the Community Planning Board.
- (d) **Consultations**  
The officers listed in the appendix have provided the information for the monitoring report.

The Council's Performance and Quality Assurance Officer and her team has provided the monitoring information. She has been consulted on the improvements to the monitoring framework for SOA 209-10. She has stated that it is important to identify the impact of the action in addition to the actual progress update. From October quarterly reports will be submitted for 2009-10 to enable officers to put in place monitoring mechanisms.


The PPR and Communications Officer have been consulted to identify his needs to producing the performance report and ensuring that the monitoring information within this report will lead him onto the potential contents for that report. Senior staff should note that requirements for the PPR will necessitate further contact with departments to develop more detailed case studies of particular services. These case studies will be those that best illustrate the more accessible and relevant elements of the council's performance to the public.

## 5. CONCLUSION

- 5.1 The performance cycle of the first SOA (2008/09) is now complete. This report provides a detailed analysis of performance against the delivery of actions under each of the National Outcomes, for which the Safer and Stronger Group is responsible. 79% of the actions have been deemed to contribute or partially contributed to the outcomes with 21% of actions have not yet impacted on the outcome.
- 5.2 The report also sets out a series of recommendations designed to improve the efficiency and effectiveness of the reporting process for the new SOA (2009/10).

**Author of Report:** Roy Anderson, Community Planning Officer  
Research and Information Officers, Moray Council

**Background Papers:**  
**Ref:**

**Signature**  \_\_\_\_\_

**Date:** 21/5/09

**Designation:** Corporate Policy Unit Manager

**Name:** Bridget Mustard